

MASSTAX 2

LESSONS LEARNED

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PROGRAM ACQUISITION – THE RFR

- You will NEVER write a perfect procurement, and no vendor will ever send in a perfect proposal
- There are things that help...
 - The program and the RFR leadership should primarily be driven by the business.
 - It's better to adhere to your schedule that to try to achieve perfection
 - Err on the side of being too high level on requirements
 - Allow vendors to provide alternatives, especially in the area of implementation options
 - Find alternative processes to allow clarification and collaboration during the procurement process – it is possible
 - Procurement experience on the team really helps



PROGRAM ACQUISITION – NEGOTIATION

- Contract negotiations should be a time to have a meeting of the minds and begin to establish relationship and priorities.
 - Try not to let the lawyers set the tone. Consider having a “legal track” and a “business track”
- Minimize the number of people on the procurement team
 - Not always great to have procurement team wind up as project team
- If you squeeze your vendors beyond their comfort level – they will find a way to squeeze you back
- If you are buying COTS, the vendor should be a party to the contract.
 - Access to their expertise is much more than a “nice to have” and it’s expensive
- No matter how long you think selection and negotiations will take.... It will take longer



CONSULTING PARTNERS

- Your relationship with your partner will be one of your most critical success criteria
- Get the relationship right up-front – chemistry matters
- Corporate experience is MUCH less important than the experience and personalities of the individual consultants
- There WILL be staffing turnover, especially with consulting partners.
- Be clear about working conditions, but be flexible.
- Create a team atmosphere



PROGRAM MANAGEMENT

- Program Management should be about leading the team and removing road-blocks
- Staff the project with people with the right knowledge AND the right attitudes
- Governance is critical
 - Decision making processes need to be clear and transparent – Use RACIs
 - Decisions need to be made at the right time, when you have the right information.
 - Try to make the decisions with the most ramifications first – it will prevent rework and reconsideration later
- Build and track Program Level KPIs
- 100 Page PMP's do not help projects succeed – management tools and processes do.
- Have a process for trading good requirements for bad



ORGANIZATIONAL CHANGE MANAGEMENT

- OCM is always going to fundamentally be an agency responsibility
- Your vendor can and should provide methodology, strategy and planning support – but they can't effectively do change management without visible leadership from several levels within the agency
- In order for OCM to be successful, you need a business vision and a business case. These are the two best ways to prevent repaving the cow paths
- Don't forget OCM activities for the program team.
- If you are going from Custom to COTS there are additional challenges for your program team as well as for your eventual end users. Face them head on